

CIA RETIREMENT STAFF

1. ACCOMPLISHMENTS

During Fiscal Year 1966 the CIA Retirement Staff was engaged solely in activities concerned with the implementation of Headquarters Regulation [REDACTED] CIA Retirement and Disability System, and workload involved in the day-to-day administration of both the participation and retirement phases of the System. General accomplishments in this regard are as follows:

25X1A

a. Screening of On-duty Employees to Identify Those Qualified for Designation as Participants

This activity involved considerable coordination and liaison with representatives of the Office of Computer Services, Office of Personnel and all Agency Career Services in connection with the development, scheduling and issuance of rosters of Agency employees for use in determining those employees eligible for designation as participants in the CIA Retirement and Disability System. The number of employees called up for screening as of 30 June 1966 totals [REDACTED]

25X9A2

b. Designation of Participants

25X9

(1) A total of [REDACTED] employees have been formally designated as participants in the CIA Retirement and Disability System.

(2) A total of 476 cases have been processed by this Staff, reviewed by the CIA Retirement Board, approved by the Director of Personnel and are now in various stages of processing.

(3) A total of 13 employees who were processed by this Staff and found to be eligible for participation in the System have exercised their vested right and elected NOT to remain in the System.

c. Employees Found to be Ineligible for Designation

25X9

A total of [REDACTED] employees located in Headquarters and in almost all overseas Stations and Bases, some [REDACTED] in number, have been advised by memorandum or dispatch originated in this Staff of their non-eligibility for designation as participants in the System.

25X9

d. Retirements

Responsibility for this function was transferred to the Retirement Branch, Benefits and Services Division, effective 1 January 1966. However, during the period 1 July 1965 - 31 December 1965 the following retirements were processed and effected by this Staff:

|                       |    |
|-----------------------|----|
| Voluntary.....        | 22 |
| Disability.....       | 2  |
| Mandatory.....        | 15 |
| Death in Service..... | 6  |
| Total                 | 45 |

e. CIA Retirement Board

The CIA Retirement Board was established to assist and advise the Director of Personnel in the administration of the CIA Retirement and Disability System. Its membership is comprised of senior Agency officials nominated by the Deputy Directors and appointed by the Director. The Chief of the CIA Retirement Staff serves as Executive Secretary of the Board and the CIA Retirement Staff provides necessary secretariat support to the Board, including the preparation of the agenda and agenda items, individual cases for Board review, and the formal minutes of such meetings. In this connection, the CIA Retirement Board met on 29 separate occasions during Fiscal Year 1966 and the average length of such meetings was 1 hour and 25 minutes; the case workload for such meetings averaged 115.

f. Development of Forms and Memoranda

During Fiscal Year 1966 various types of forms and memoranda were developed or modified by the CIA Retirement Staff for use in connection with the day-to-day administration of the CIA Retirement and Disability System.

2. WORKLOAD DATA

Specific figures by type of function which reflect the workload of this Staff during Fiscal Year 1966 follow:

|   |       |        |
|---|-------|--------|
| a. Preparation of Forms 198, Certified Loan Request, Official Personnel Folder .....  | 4,101 |        |
| b. Preparation of Forms 3100a, Nominee Check List .....   | 3,183 |        |
| c. Arithmetical computations completed in determining age, Service Computation Date, Longevity Computation Date and periods of "qualifying service" .....                                     |       | 25X9A2 |
| d. Preparation of Forms 3100, Request for Nomination as a Participant in the CIA Retirement and Disability System, to reflect Director of Personnel approval of designations .....            |       | 25X9   |
| e. Preparation of memoranda for the signature of the Director of Personnel to record his approval of employees as participants in the System .....  | 67    |        |
| f. Research of all necessary information for the completion of Forms 1152, Request for Personnel Action, to designate employees as participants in the System, and typing of such forms ..... |       | 25X9   |

~~CONFIDENTIAL~~

- g. Preparation and routing of all dispatches, field and Headquarters memoranda, notifying employees of their designation as participants in the System .....
- h. Coding and typing of Forms 3108, Record Transaction Notice, for incorporation into the separate Machine Records System maintained by the Office of Computer Services for the CIA Retirement and Disability System .....
- i. Research and typing of memoranda over signature of Director of Personnel to Heads of all Career Services requesting their certification in connection with the Fifteenth Anniversary Review of Participants in the System .....
- j. Preparation of memoranda to employees prior to their formal designation as participants requesting their 15-year election to remain in the System .....
- k. Research, typing and routing of memoranda to participants in Headquarters and overseas Stations and Bases requesting their 15-year election to remain in the System .....
- l. Research, typing and routing of memoranda to employees in Headquarters and overseas Stations and Bases advising them of their non-eligibility for designation as a participant in the System .....
- m. Research and typing of Forms 1236, Transmittal Manifest, used in transmitting all CIA Retirement Staff dispatches and memoranda to overseas Stations and Bases .....
- n. Preparation and typing of memoranda addressed to the Director of Central Intelligence, for the signature of the Director of Personnel, requesting approval of Requests for Voluntary Retirement under the System .....
- o. Preparation and typing of memoranda addressed to participants notifying them of the approval of their requests for voluntary and disability retirement under the System .....
- p. Preparation and typing of memoranda addressed to participants notifying them of pertinent information relative to their mandatory retirement .....
- q. Computation of annuities in behalf of participants in the System which required the verification of creditable service, both military and civilian, and verification that all periods of service were covered by retirement deductions .....
- r. Preparation and typing of commendatory letters for the signature of the Director of Central Intelligence for presentation to participants retiring under the System .....

25X9

~~CONFIDENTIAL~~

s. Prepared requests for "Retirement Certificates" for presentation to participants retiring under the System ..... 35

3. PLANS AND OBJECTIVES

a. Fiscal Year 1967

25X9A2  
25X9  
25X9  
25X9A2  
25X9A2  
From the total of [REDACTED] employees on the initial call-up rosters, a total of [REDACTED] employees had been appropriately screened as of 30 June 1966. This leaves a balance of 219 cases currently pending in this Staff and a total of [REDACTED] employees remaining to be screened in Fiscal Year 1967. The latter figure represents workload for this Staff that will result from either the nomination of the latter group of employees for designation as participants in the System, or the declaring of such employees as ineligible for participation in the System. Based upon past experience it is estimated that some 35% of these employees, or approximately [REDACTED] will be nominated and the remaining [REDACTED] employees will be declared ineligible for participation in the System. In either event it is estimated that the workload for the first quarter of Fiscal Year 1967 resulting from such cases will remain about the same as in Fiscal Year 1966, and until completed it will require the services of the personnel now assigned or detailed to this Staff. Upon the completion of the initial "screening" phase of the program it is believed that the size of this Staff could be reduced to three employees, due to a decrease in volume, with titles and grades as follow:

Personnel Officer - GS-12  
Personnel Officer - GS-09  
Clerk-Typist - GS-05

The workload of the CIA Retirement Staff should then be generally confined to the following areas of activity:

- (1) Review, verification of periods of claimed qualifying service, and processing of nominations submitted by Career Services in behalf of employees who had previously been declared ineligible for designation as participants on technical grounds.
- (2) Review, verification of periods of claimed qualifying service, and processing of nominations submitted by Career Services in behalf of employees who had not been reviewed during the initial screening phase of the program.
- (3) Review of cases of employees who had been designated as participants on the basis of "claimed" qualifying service in order to verify such periods as "qualifying service" under the System prior to the completion of the 5th and 10th anniversary review involved.

(4) Conduct necessary follow-up and review in order to ensure that participants in the System continue to meet the criteria for participation, including the performance of the minimum periods of qualifying service as prescribed under the System.

(5) Conduct necessary follow-up and review to ensure that the proper review is made six months prior to a participant completing fifteen years of service, and that participants whose careers are adjudged by the Director of Personnel to be qualifying for the System are given the opportunity of exercising their vested right of electing to remain in the System.

(6) Provide such secretariat support to the CIA Retirement Board as may be required.

b. Fiscal Year 1968

Same as the last three quarters of Fiscal Year 1967 as outlined above.